HomeServe

Portal & SMS Text
User Manual

Contents

Section 1 – Introduction
Introduction
Logging on
Search
Support

Section 2 – Job List
Homepage
Job List
Search

Section 3 – Job Details
Customer Information
Address
Job Information
Appliance Information
Policy Information
Payment Information

Section 4 – Processing a Job
Accept
Contacting the customer
Engineer Onsite
Further Work
Complete
Submit an Invoice
Refuse

Section 5 – Other Updates
General Update
Boiler Update
Remedial Required

Section 6 – SMS
Contractor Set Up
How to Use SMS Text
What do HomeServe expect from the contractor?
Important Things to Remember

Section 1- Introduction

Introduction

The HomeServe Job Portal has been designed to enable HomeServe and the Portal registered contractors to exchange information about allocated jobs electronically, thereby improving the information available to all parties.

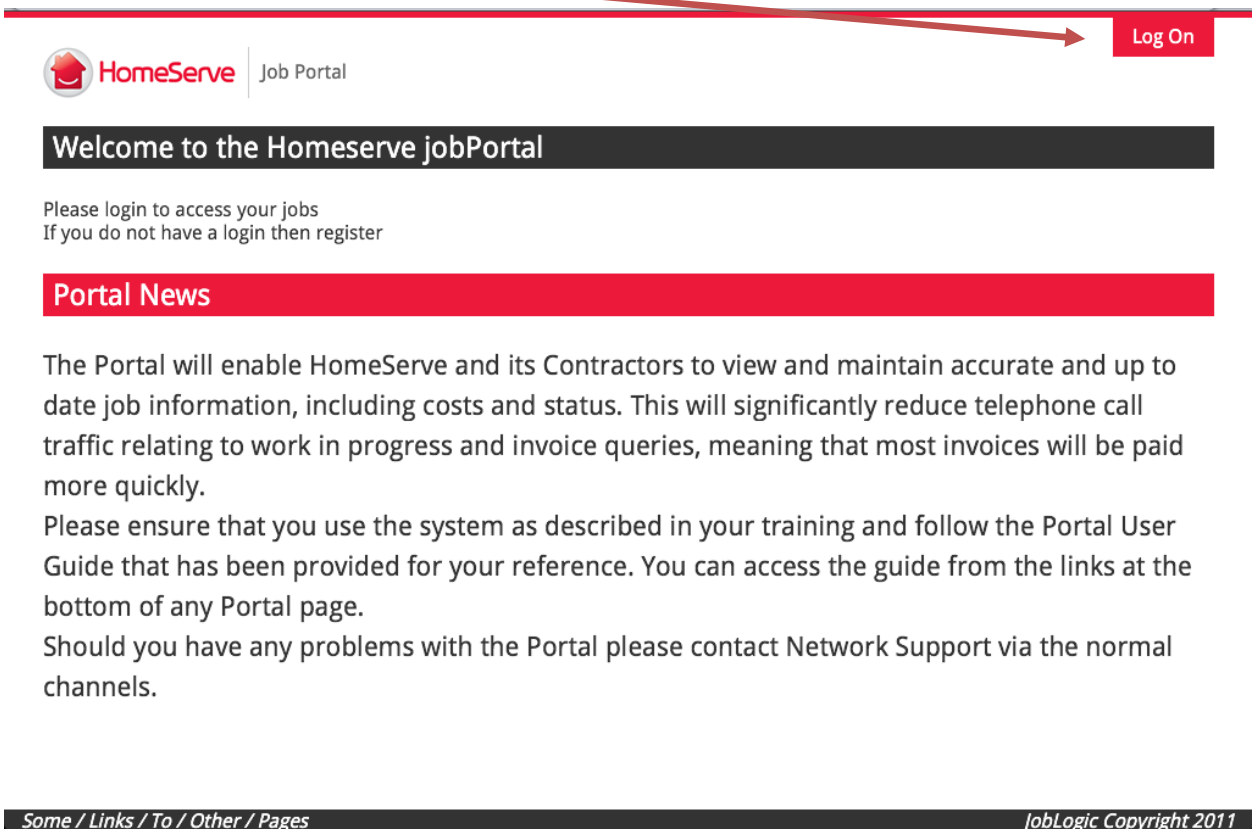
By utilising the HomeServe Job Portal as the deployment method, this should not only reduce the number of chase calls received by the contractor from Homeserve but also enable quicker payment of contractor invoices.

Logging On

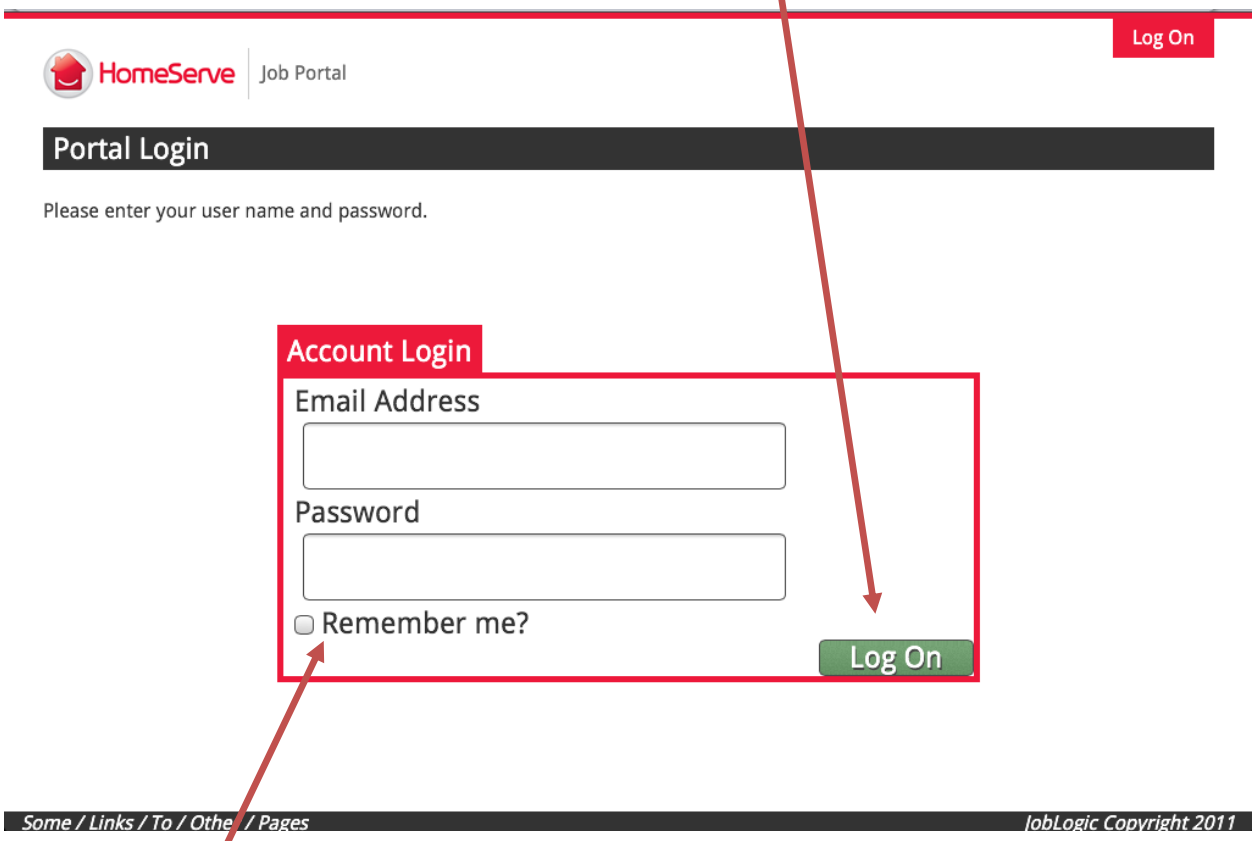
The HomeServe Job Portal is a web based system and you will need to log on via your internet connection. To do this you will need to access the following web address:

http://www.homeservejobs.com

Once you have accessed the web page you will be presented with the screen below at this point you will need to click onto the Log On tab in the top right hand corner of the screen:


Log On
HomeServe
Job Portal
Welcome to the Homeserve jobPortal
Please login to access your jobs
If you do not have a login then register
Portal News
The Portal will enable HomeServe and its Contractors to view and maintain accurate and up to date job information, including costs and status. This will significantly reduce telephone call traffic relating to work in progress and invoice queries, meaning that most invoices will be paid more quickly.
Please ensure that you use the system as described in your training and follow the Portal User Guide that has been provided for your reference. You can access the guide from the links at the bottom of any Portal page.
Should you have any problems with the Portal please contact Network Support via the normal channels.
Some / Links / To / Other / Pages
JobLogic Copyright 2011

When you click on the Log On button you will be directed to the page below.
Once here you will need to enter your unique User name and Password then click on the green Log On button at the bottom of the screen:



If you tick 'Remember me' the Job Portal should automatically save your User name and password on the computer you are using however, please ensure that you remember these in case you need to re-enter them.

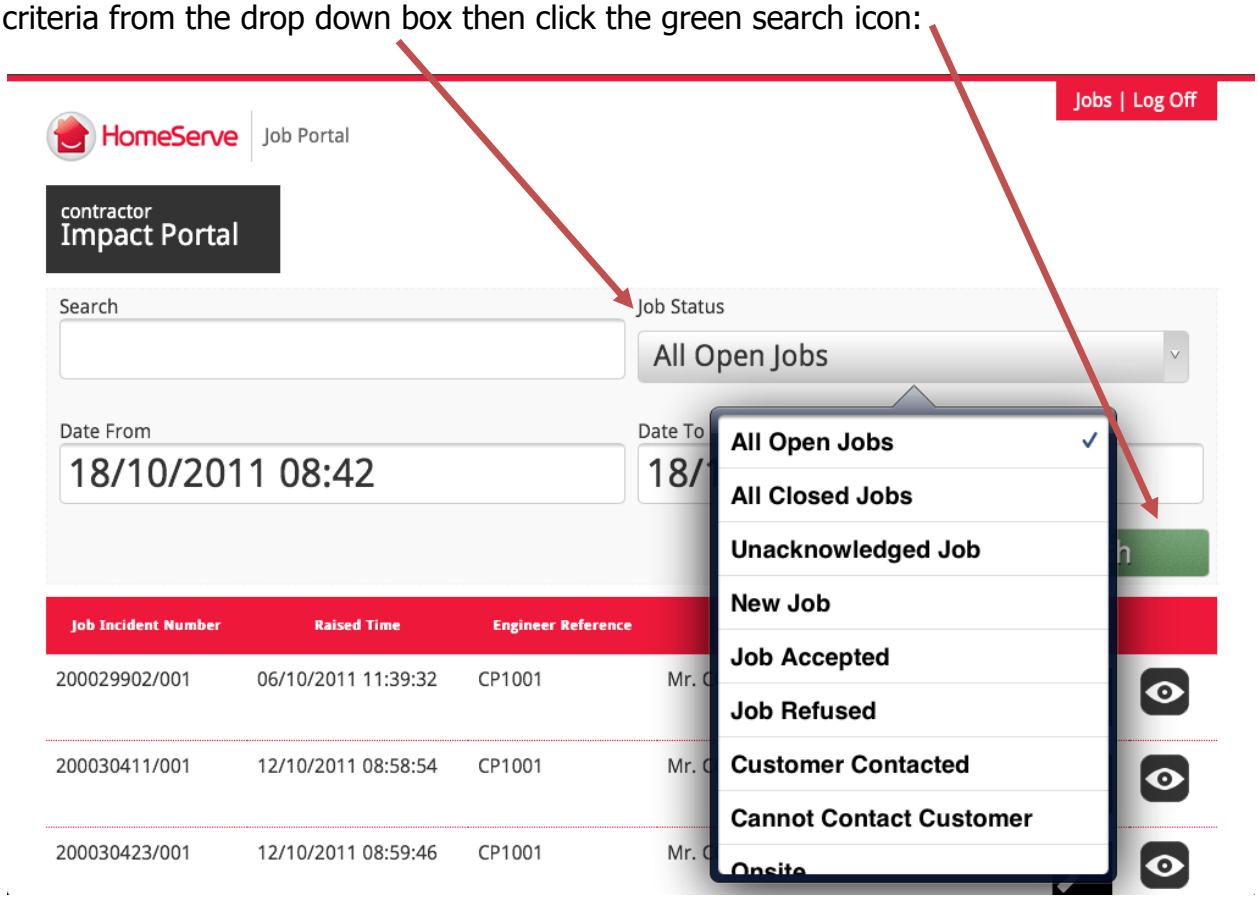
Your unique log in details will be provided to you by HomeServe.

Change to new shot with proper links on it

Search

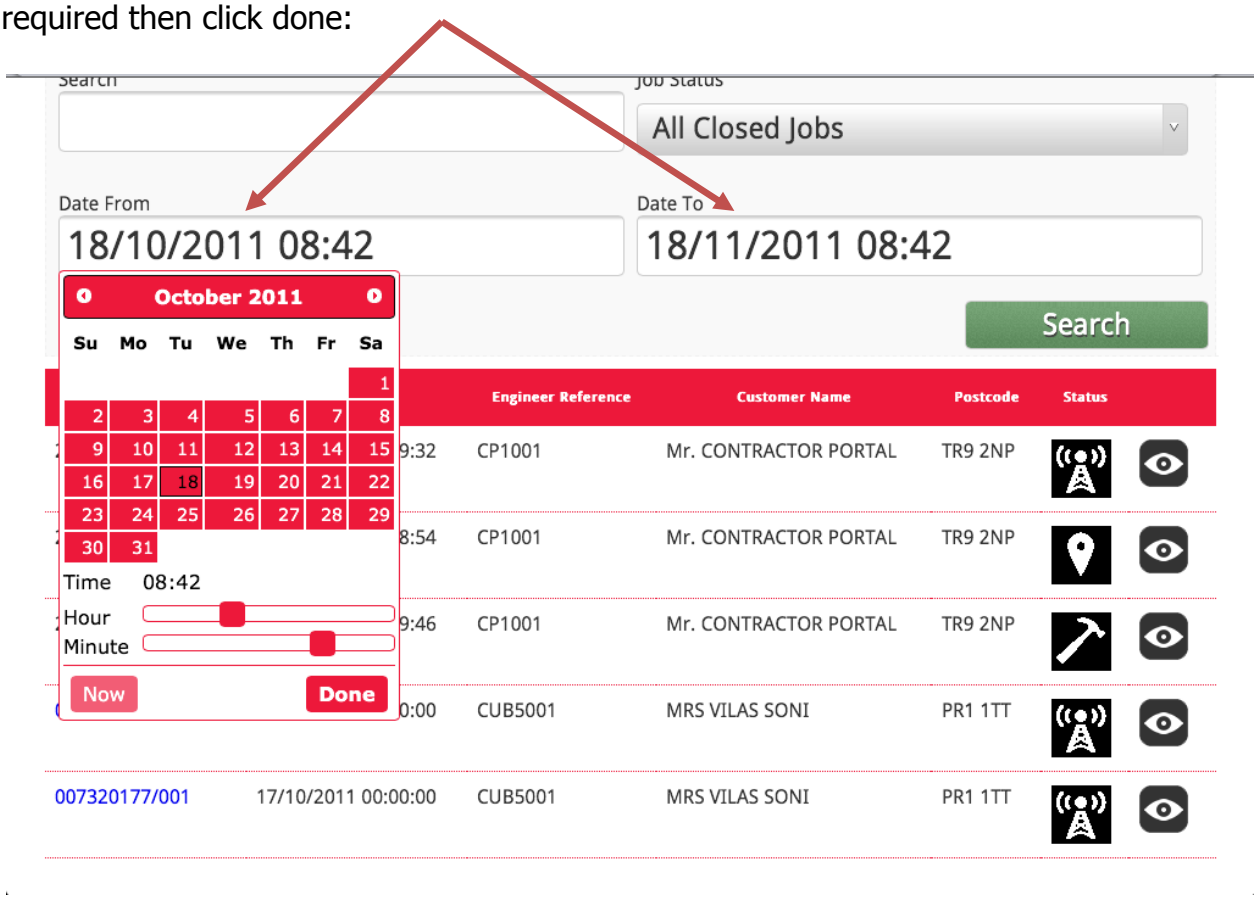
The default job list screen displayed by the HomeServe Job Portal will contain all of the contractors open jobs however, the HomeServe Job Portal has several search options. These have been designed to make the navigation through the system as easy as possible.

The first search option is the status of a job. Click in the job status box and select your criteria from the drop down box then click the green search icon:



You also have the ability to search using the Date fields.

Click on either of the date fields, select the required date from the calendar and time if required then click done:



NOTE: You can also click now and it will automatically select the current date and time

Support

There are some characters that will not be accepted by ClaimCenter, if any of your messages include these characters the message will fail:

? ! ” % < > = \ / ; , ’ - _ : & # @ ~ { } [ ] *

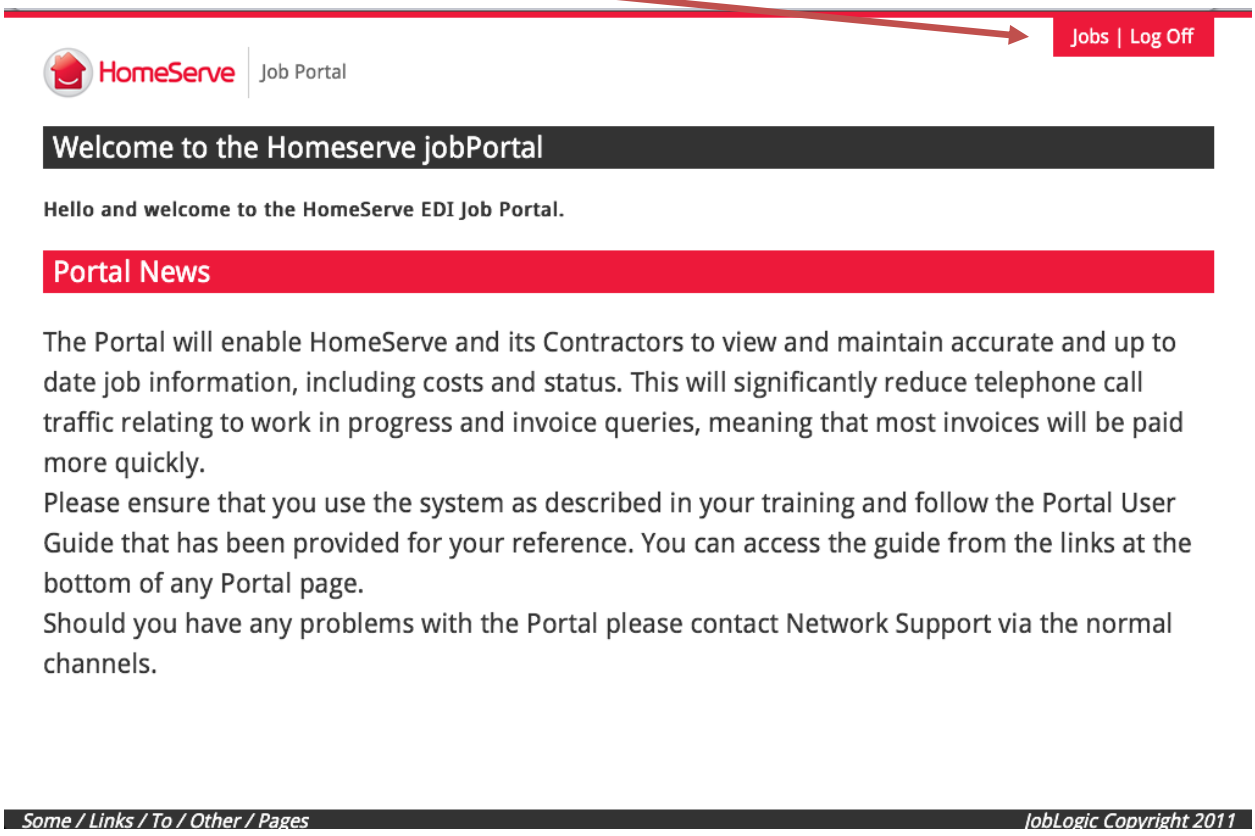
For any additional support on the HomeServe Job Portal, please contact Network Support.

Section 2 – Open Jobs

Homepage

Once you have logged into the HomeServe Job Portal you will see the home page. This is an information page and will highlight any general user information or important updates from HomeServe.

To access your specific jobs you will need to click on the Jobs tab in the top right hand corner:

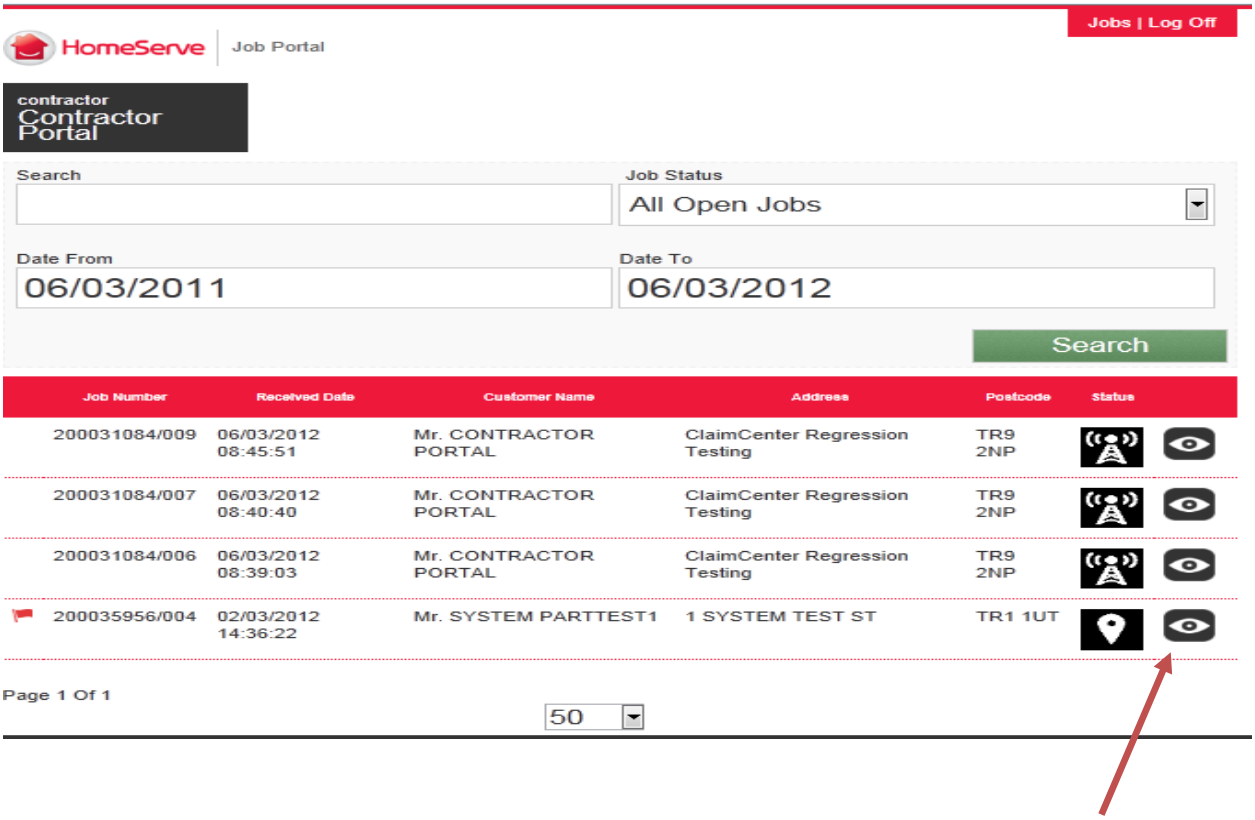

Jobs | Log Off
HomeServe
Job Portal
Welcome to the Homeserve jobPortal
Hello and welcome to the HomeServe EDI Job Portal.
Portal News
The Portal will enable HomeServe and its Contractors to view and maintain accurate and up to date job information, including costs and status. This will significantly reduce telephone call traffic relating to work in progress and invoice queries, meaning that most invoices will be paid more quickly.
Please ensure that you use the system as described in your training and follow the Portal User Guide that has been provided for your reference. You can access the guide from the links at the bottom of any Portal page.
Should you have any problems with the Portal please contact Network Support via the normal channels.
Some / Links / To / Other / Pages
JobLogic Copyright 2011

Job List

You are now at your open job list. There are six different headings:

- Job Incident Number
- Raised Time
- Customer Name
- Customer Address
- Customer Postcode
- Status

The jobs will automatically be listed in date order, with the oldest job at the top:

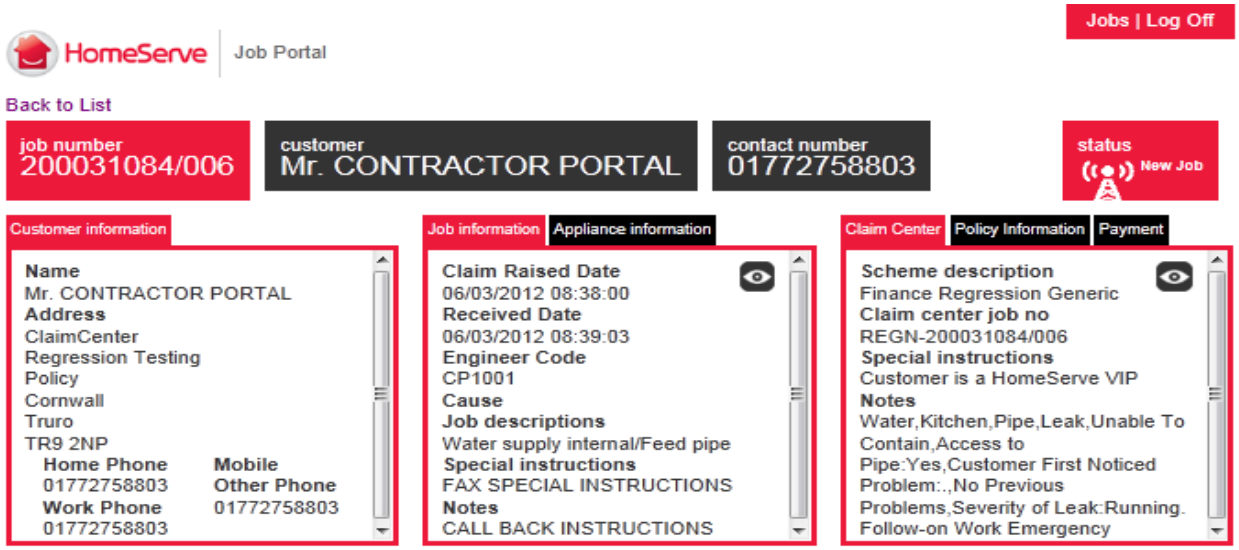


To view the job details you will need to click on the eye icon at the right hand side of the list. This will then take you into the job detail screen.

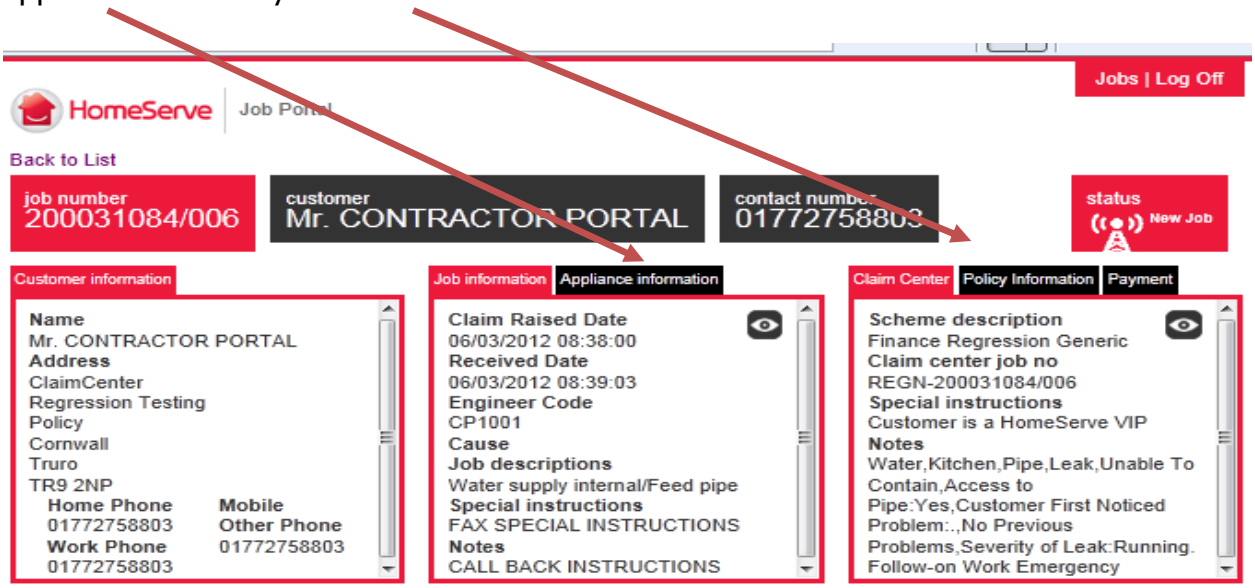
Section 3 – Job Details

The job details screen contains all of the available information about the job. All sections have selectable tabs and will allow you to view different aspects of job information.

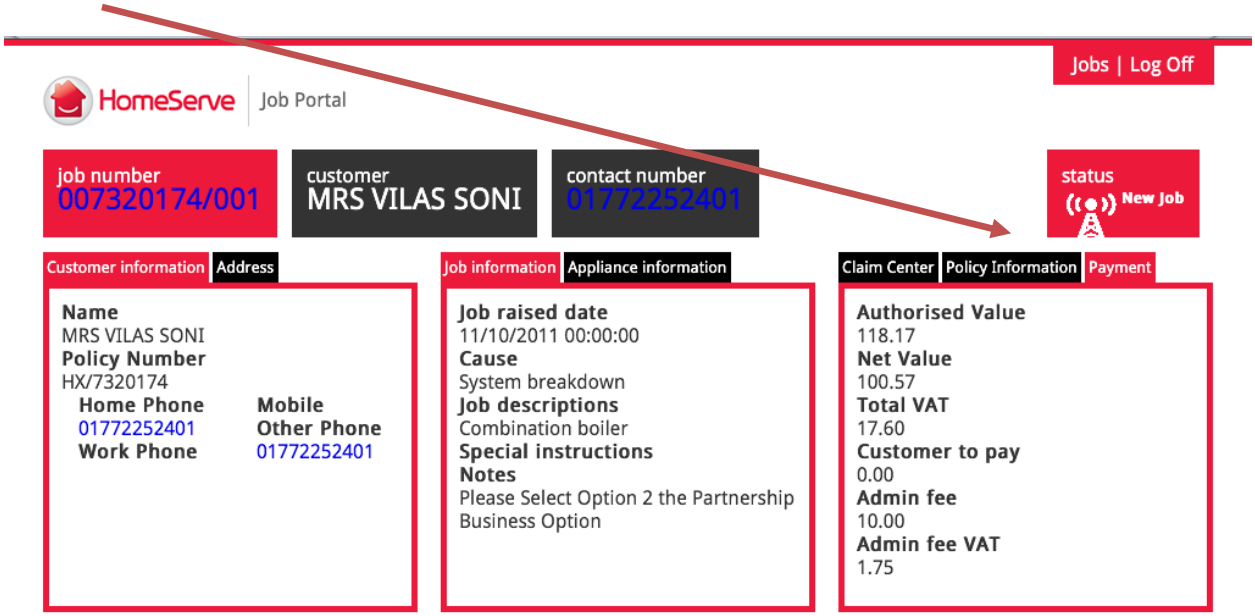
Customer, Job and Policy information tabs are the default on opening:



Appliance and Policy information tabs selected:



The Payment tab shows the authorised costs on the selected job:



NOTE: Cost upgrades cannot be submitted via the HomeServe Job Portal, these should be requested as per standard process. Any approved changes to the payment details will be shown on the payment tab.

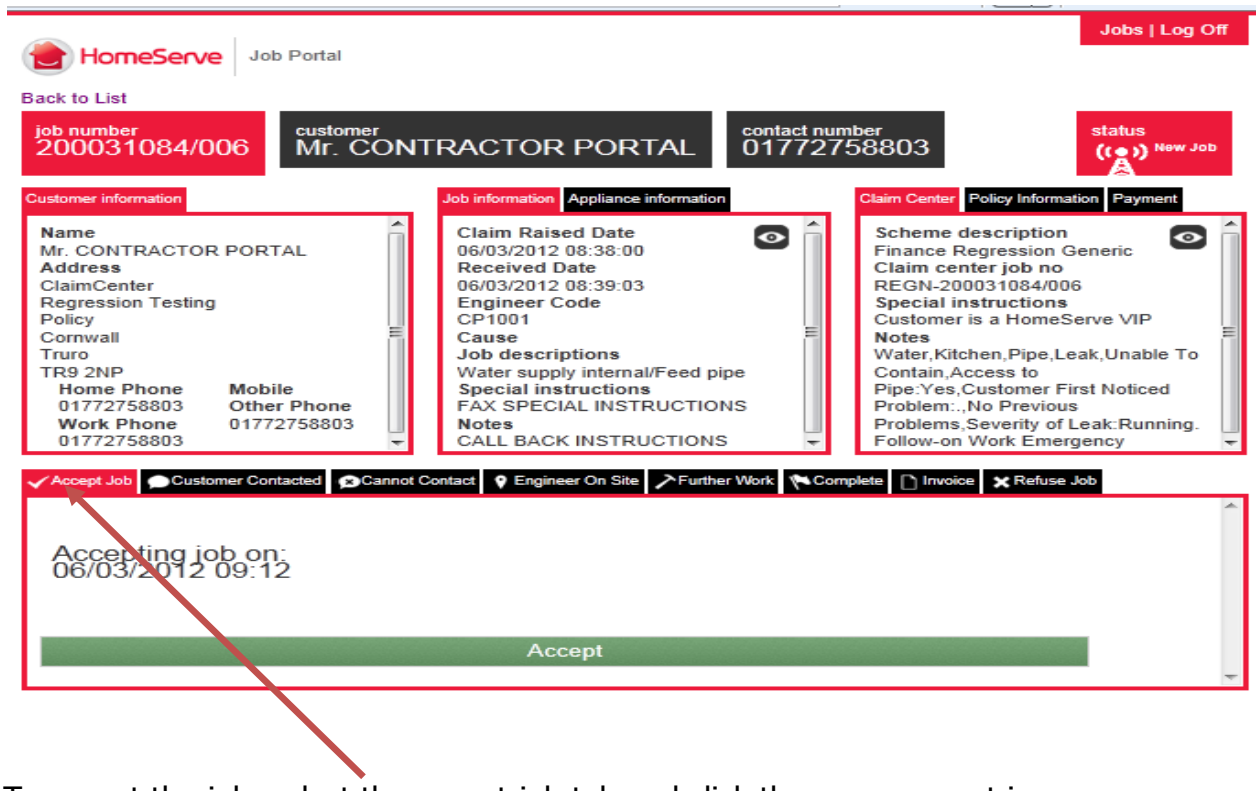
Section 4 – Processing a Job

The bottom section of the job details screen contains the permitted update tabs.

- Accept Job
- Customer Contacted or Cannot Contact (which must be followed by Customer Contacted before the job can be moved to the next stage)
- Engineer Onsite
- Further Work (only required if the job cannot be completed on the first visit)
- Complete
- Invoice
- Refuse Job

The HomeServe Job Portal will only allow the user to select the next update based on the current status of the job, I.E. if the job has been accepted, the user will not be able to complete the job until the customer contacted and engineer on site updates have been processed.

Accepting the job

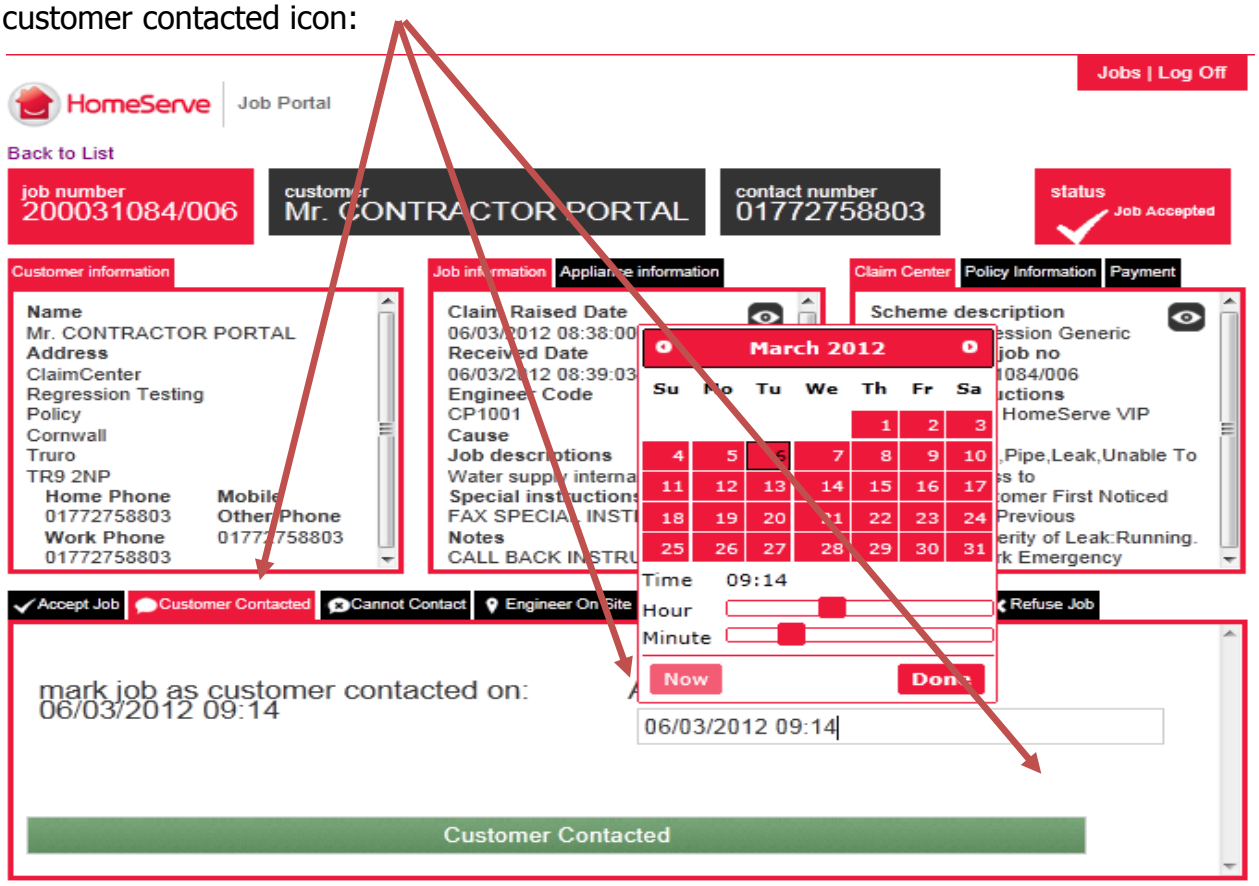


To accept the job, select the accept job tab and click the green accept icon.

The date and time cannot by amended by the user as this is automatically populated by the HomeServe Job Portal.

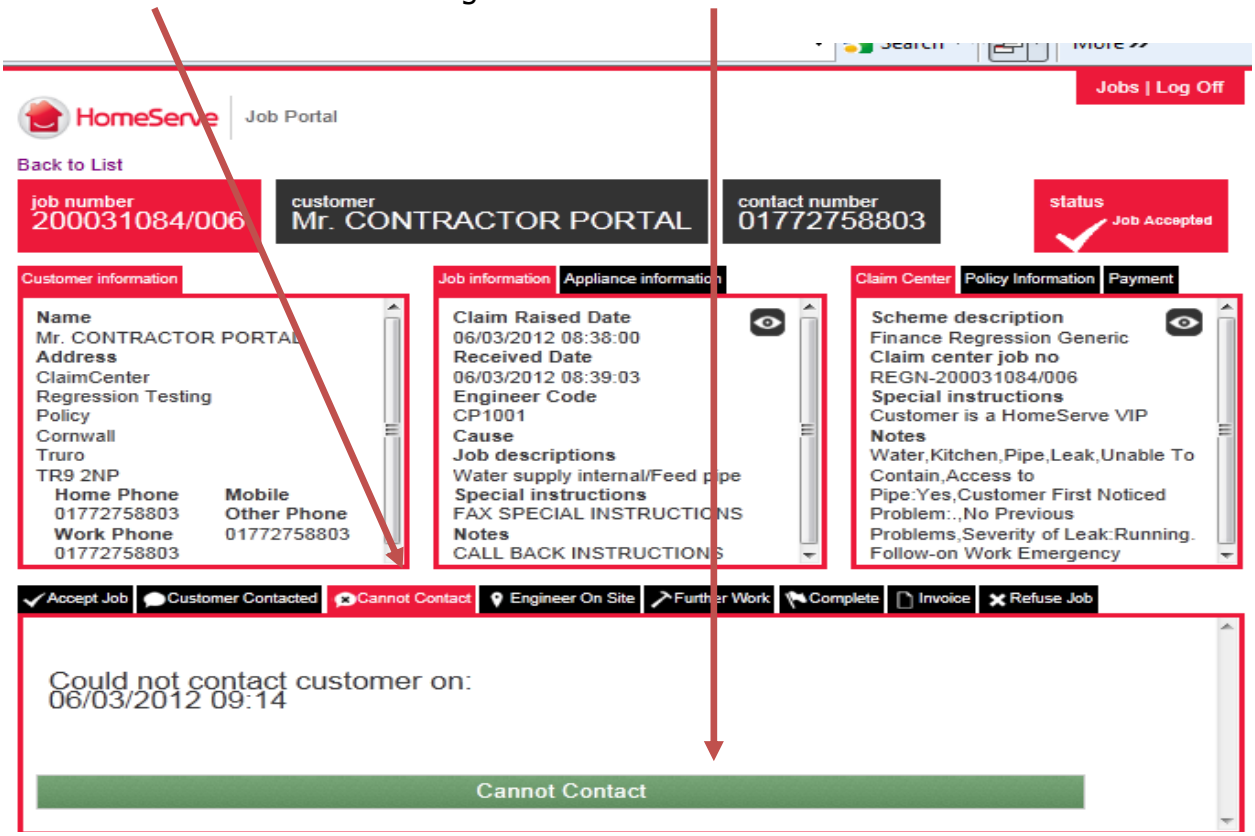
Contacting the Customer

If you **are able** to contact the customer and arrange an appointment, you must enter the appointment date and time on the customer contacted tab and click the green customer contacted icon:



NOTE: The current date and time will again be set automatically by the HomeServe Job Portal and therefore cannot be amended by the user. The appointment date and time MUST be after the deployed date and time.

If you are **not able** to contact the customer, you must update the job by selecting the cannot contact tab and click the green cannot contact icon:

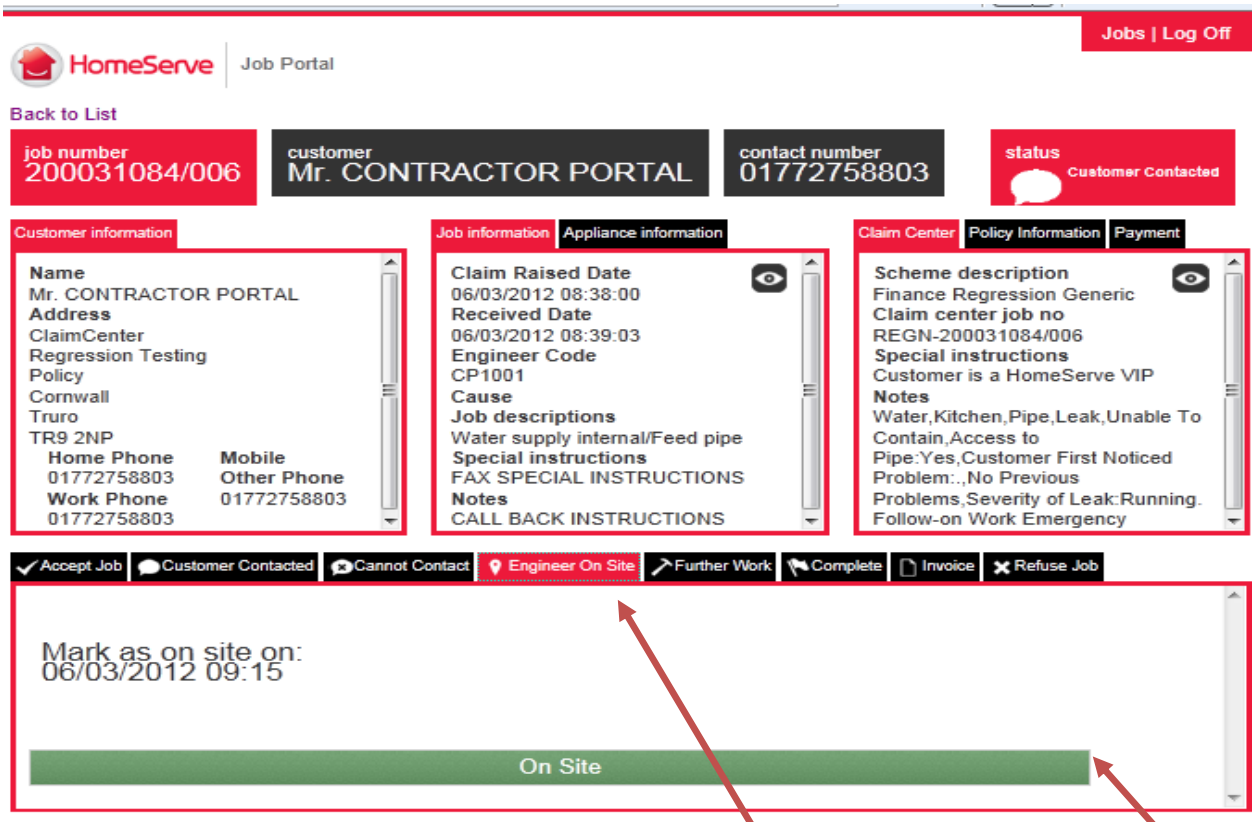


NOTE: The current date and time will again be set automatically by the HomeServe Job Portal and therefore cannot be amended by the user. This action will inform HomeServe that you have attempted to make contact with the customer but have been unsuccessful.

When you have successfully contacted the customer and arranged the appointment you must update the HomeServe Job Portal via the customer contacted tab (see previous page).

Engineer Onsite

Once the jobs has been accepted and the appointment has been made the next tab that will be available will be the Engineer Onsite tab. This is a mandatory update and therefore must be completed before you can move onto the next stage.



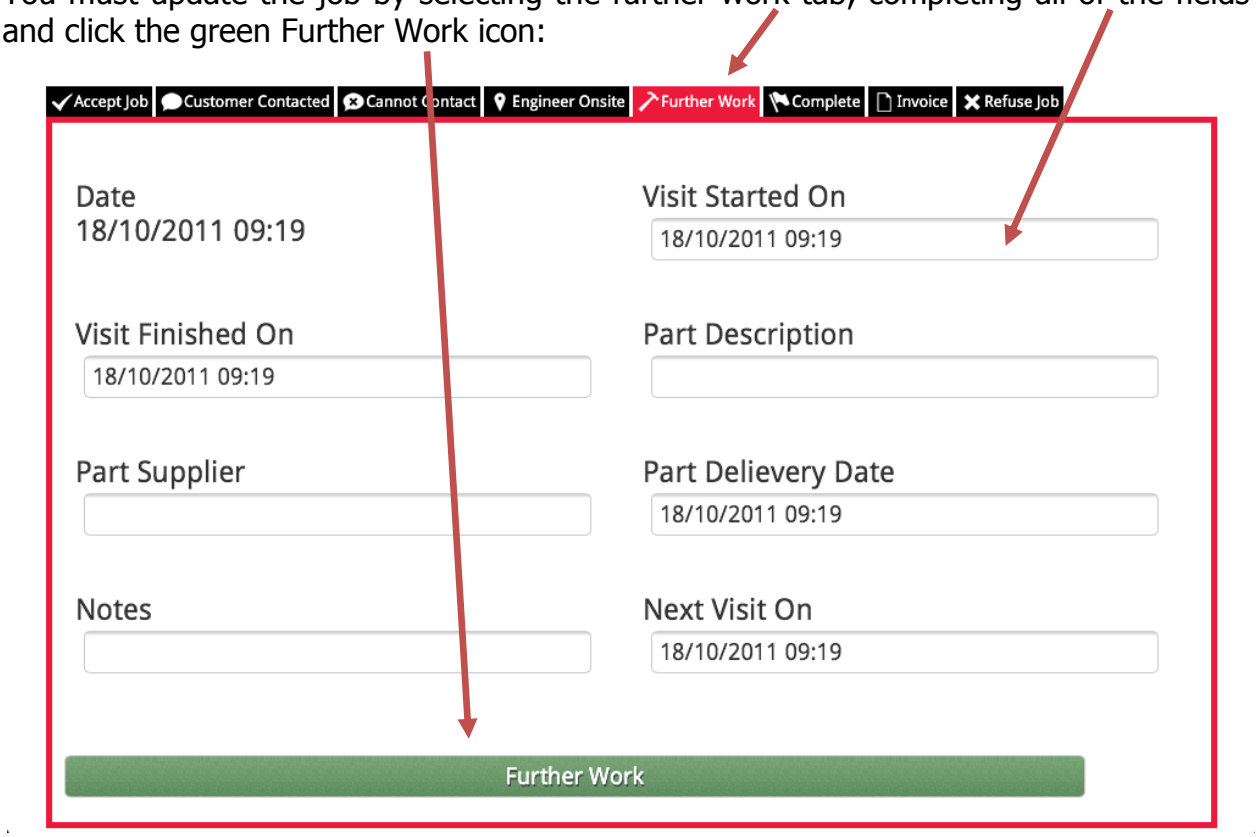
You must update the job by selecting the Engineer Onsite tab and click the green Onsite icon.

NOTE: The current date and time will again be set automatically by the HomeServe Job Portal and therefore cannot be amended by the user.

Further Work

If the job cannot be completed on the first visit then notification of further work must be provided. This will inform HomeServe that the job is not complete, what parts are required, when they are due and when the next appointment has been scheduled for.

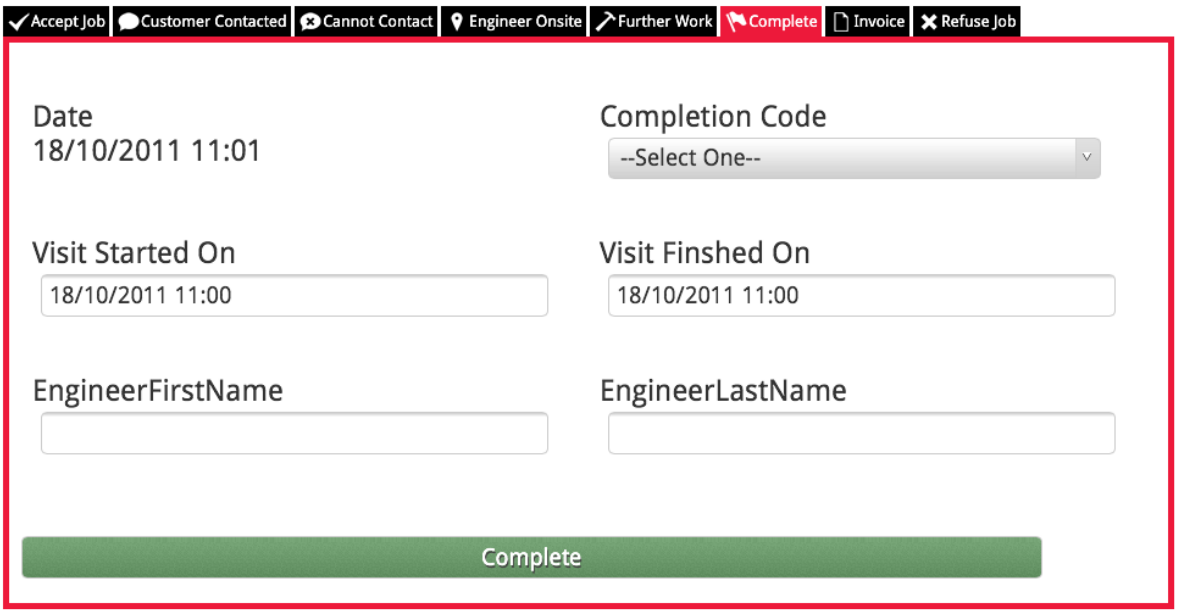
You must update the job by selecting the further work tab, completing all of the fields and click the green Further Work icon:



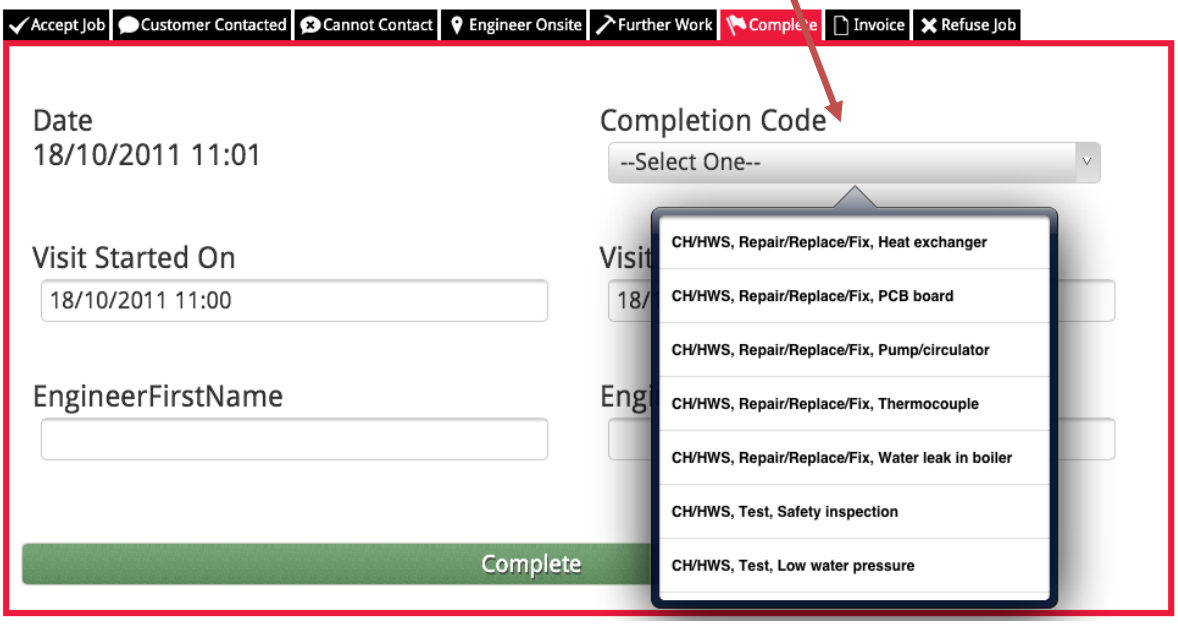
Completing a job

This is to be used to inform HomeServe that all elements of the job have been completed and will allow you to invoice against the agreed rates on the payments tab.

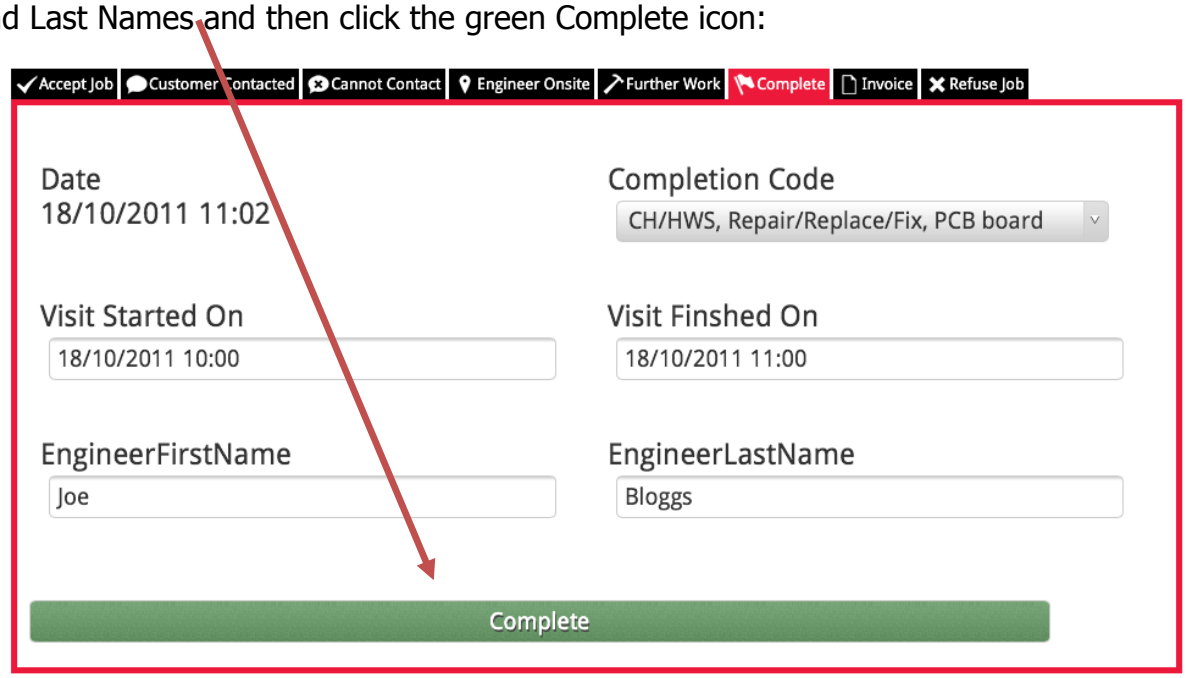
Select the Complete tab:



Select the completion code from the drop down menu:



Enter the date and time that the job was started and completed, the Engineer's First and Last Names and then click the green Complete icon:



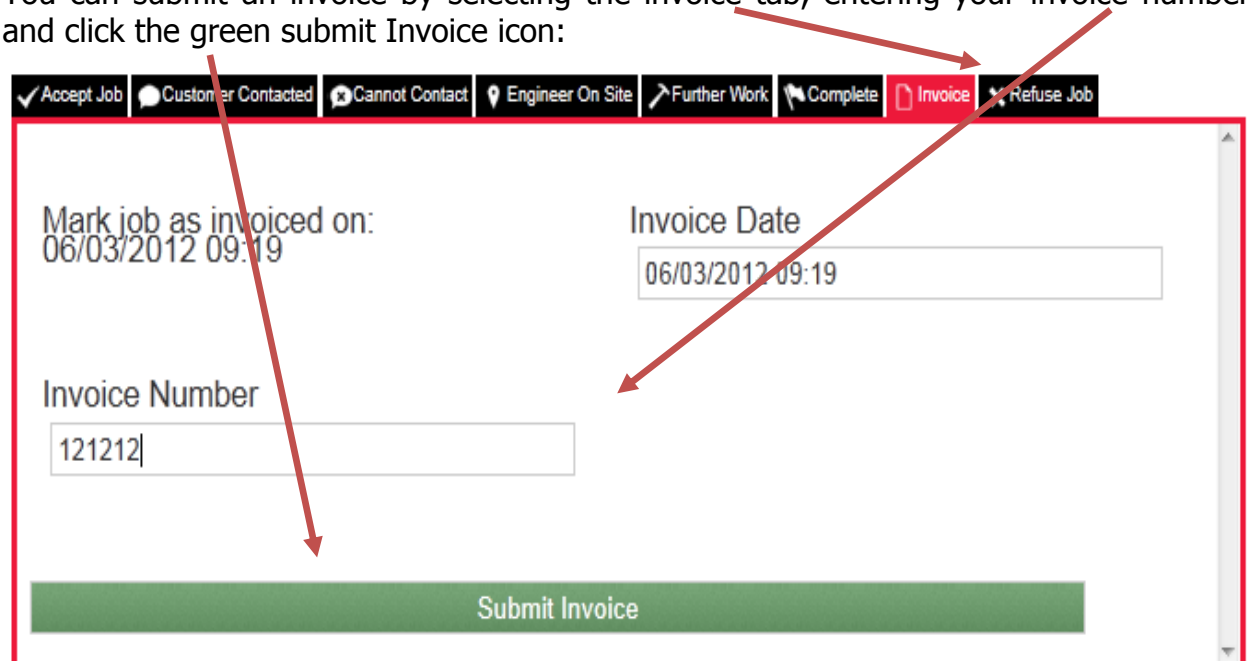
NOTE: The current date and time will again be set automatically by the HomeServe Job Portal and therefore cannot be amended by the user. The appointment date and time MUST be after the deployed date and time otherwise it will generate and error (shown on page 13)

NOTE: please note that the Engineer first name and last name are no longer optional and are now a mandatory field and will need to be filled in before you can close the job down, if no information is put into either of the Engineer first name or Engineer last name you will receive a status error message.

Submitting an Invoice

Once you have updated the HomeServe Job Portal to confirm the job is complete, you will be able to submit your invoice to HomeServe via the job portal. This will have all the required information and should ensure first time payment from HomeServe

You can submit an invoice by selecting the invoice tab, entering your invoice number and click the green submit Invoice icon:

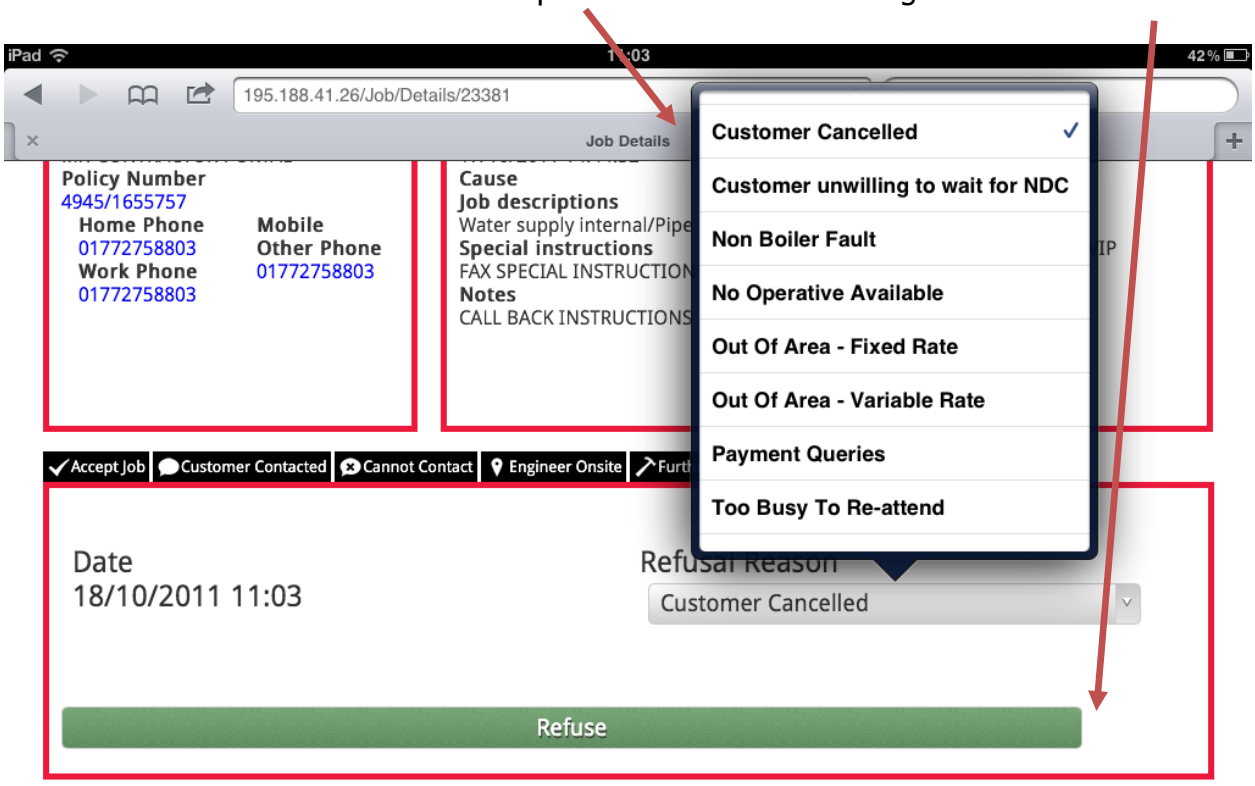


NOTE: The invoice number you submit to us must be unique, 4 or more characters and link to your accounting system. You will still be presented with the option to print the invoice via PDF if you need a copy of the invoice for your own records. You no longer have to post a paper copy to HomeServe but remember it is your responsibility to adhere to good account practice in regards to invoicing.

Refusing a Job

If you are unable to accept the job there is a refuse job tab. You must refuse the job by selecting the refuse job tab:

Select the refusal reason from the drop down list then click the green refuse icon:

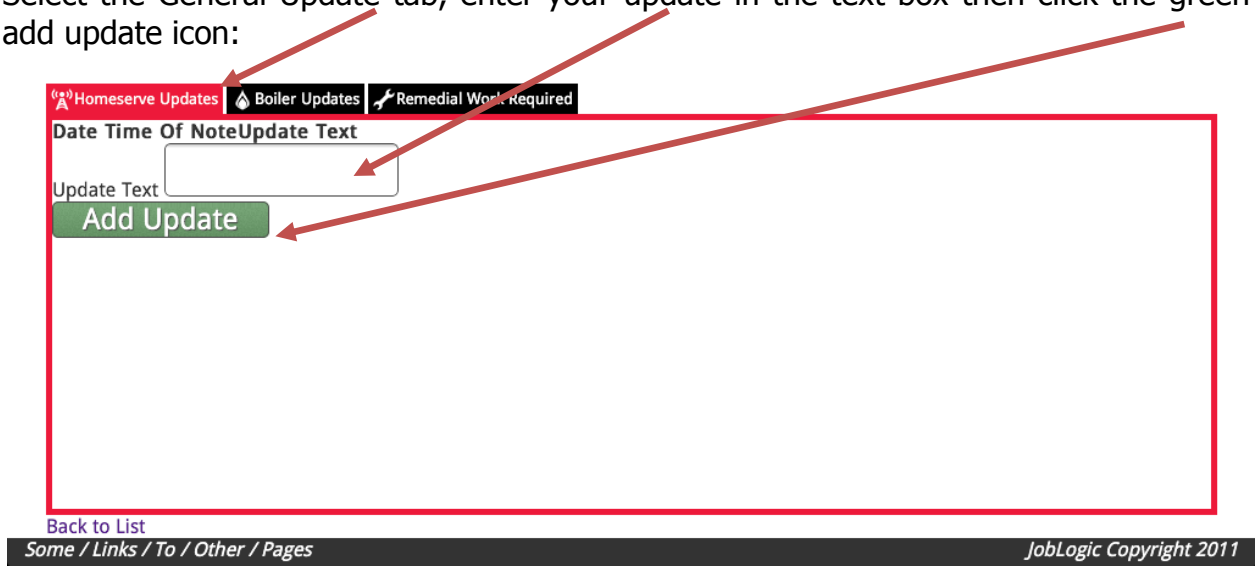


Section 5 – Other Updates

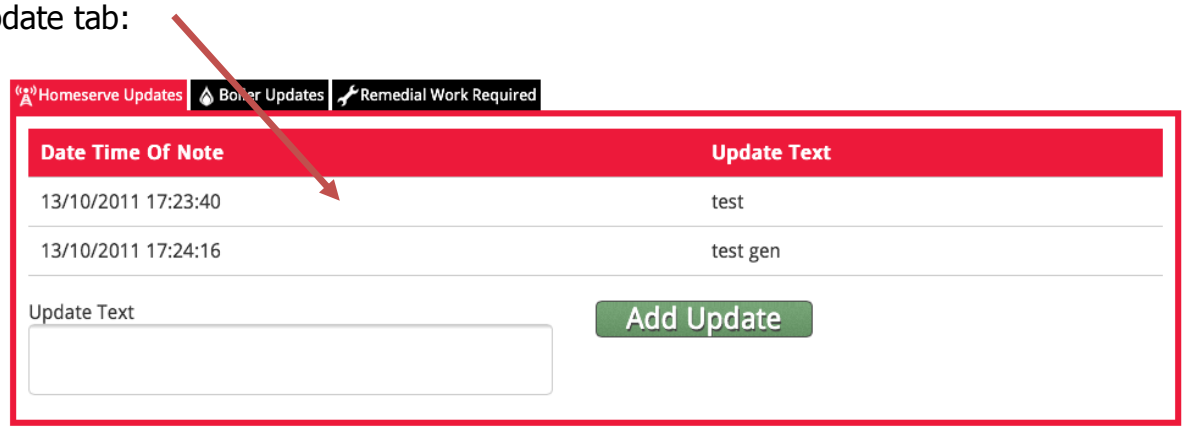
General Update

This is a free text box, it is to be used to update HomeServe with any information that may assist in managing the customers claim.

Select the General Update tab, enter your update in the text box then click the green add update icon:



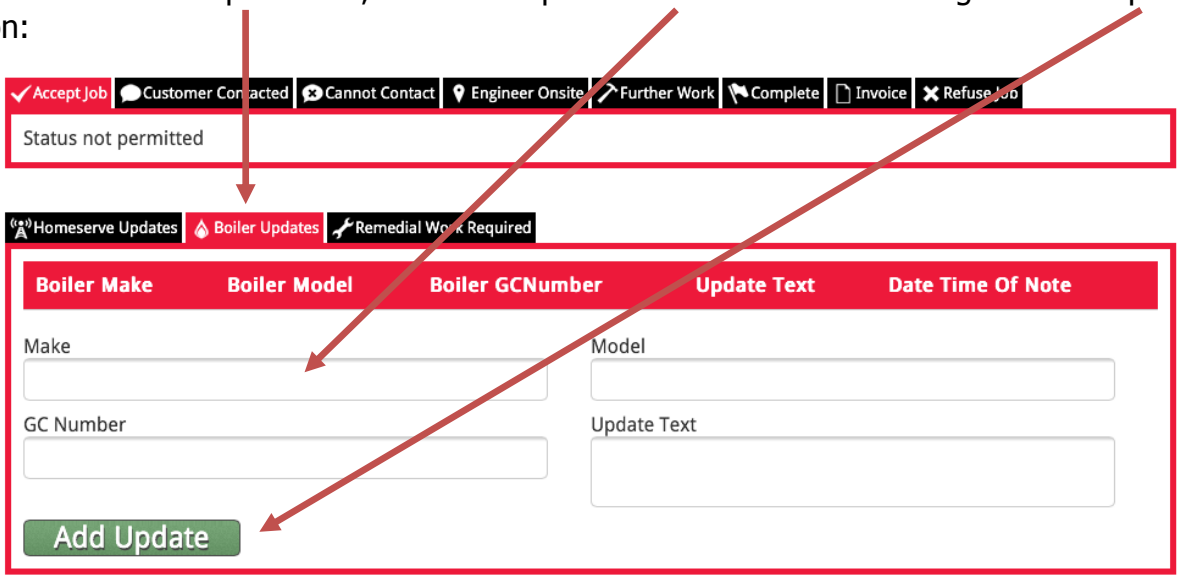
Once you have submitted a general update, you will be able to view this on the general update tab:



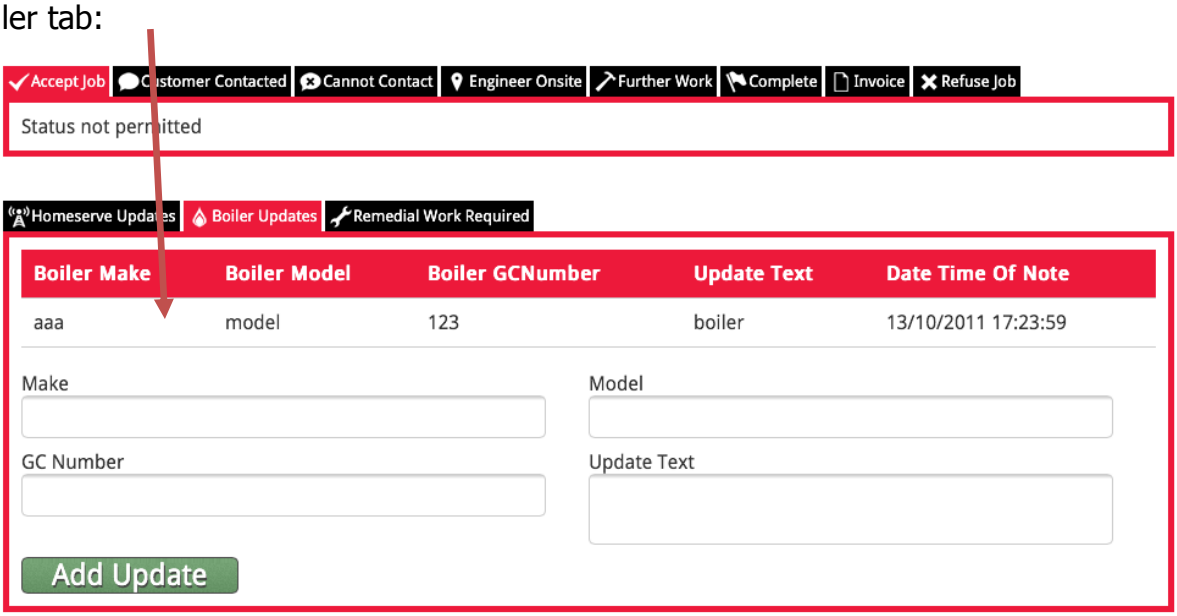
Boiler Update

The second tab is the Boiler update tab this is only to be filled in if the boiler information is different to the information supplied to you at the start of the job.

Select the Boiler Update tab, enter the updated details then click the green add update icon:



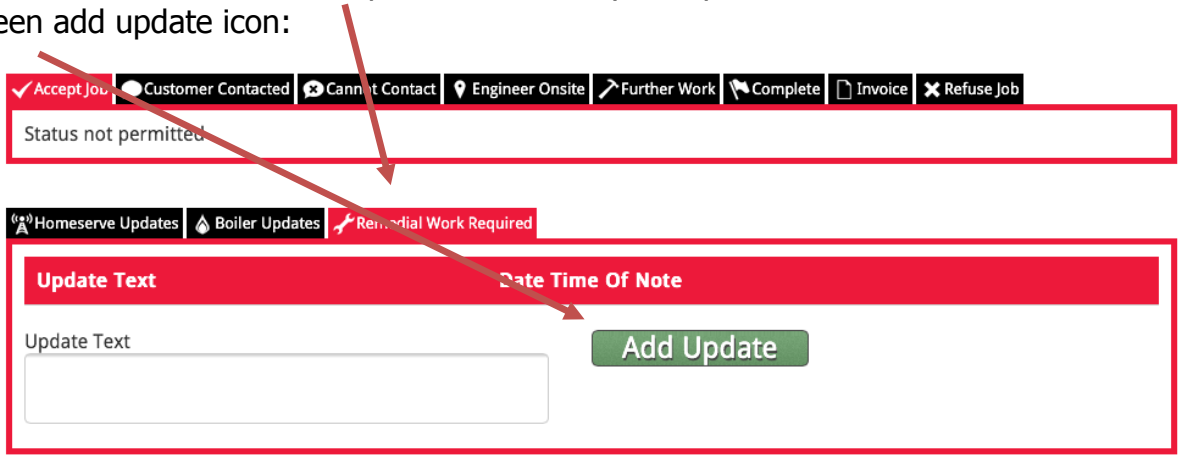
Once you have submitted a boiler update, you will be able to view this on the general boiler tab:



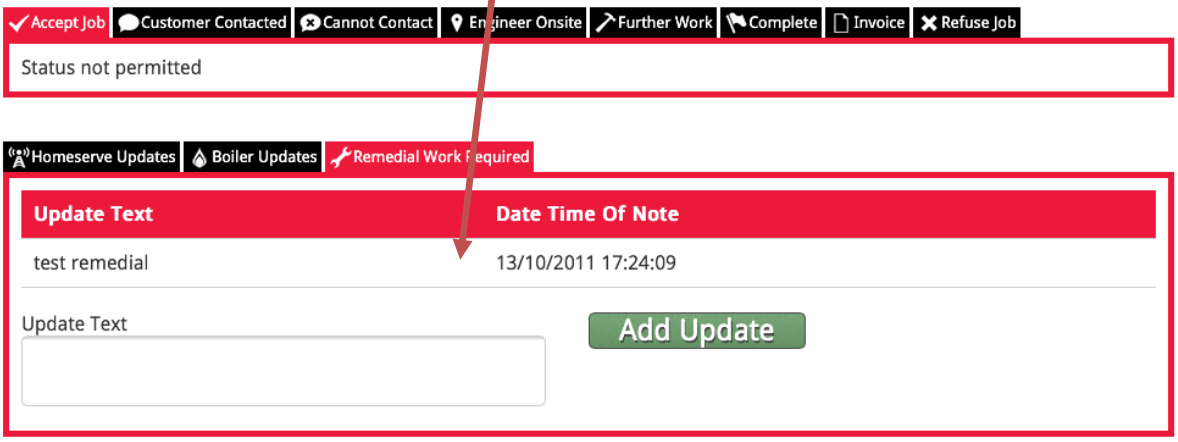
Remedial Work Required

The final tab in this section is the remedial tab, it is important that the information in here is factual and accurate as this information is relayed back to the customer and a request for them to action work against this work outside of their policy is often the outcome.

Select the remedial work required tab, enter your update in the text box then click the green add update icon:



Once you have submitted a remedial work required update, you will be able to view this on the remedial work required tab:



Section 6 – SMS

Contractor Set Up

To set up the system it will require the use of SMS Text mobile numbers which the contractor must advise to HomeServe, these will then be added to the contact methods in our claims system. There can be up to 5 SMS Text deployment mobile numbers listed and once added to the system all SMS Text deployments would then be sent to the mobile identified for that day. Any changes needed should the phone be lost or damaged can be arranged easily through Network Support in the usual way.
All mobile phones to be used for SMS Text deployment must be registered with Esendex. To register a phone with Esendex, simply send the word HomeServe to **65186**. Once this has been done Esendex will send a message back stating 'Invalid message format' once this has been received the phone will be registered for SMS Text deployment.

How to Use SMS Text

Save the Esendex phone number (**65186**) in the mobile phones to be used. This is the correct number of digits and is known as a short code.
If the Esendex phone number has been saved in the mobile the sender identity will be shown when you receive a message so you will know it is from HomeServe. It is important to note that throughout the process that the texts must be **forwarded** and should **not** be edited in any way as the content is used for validation purposes.

New Job

In the first instance a job deployed by SMS Text will present sufficient details of the job for the contractor to know the location and job type and this will allow the contractor to assess whether it can be accepted or not without HomeServe sending full customer details.
On receipt of the text the contractor will have 15 minutes to respond. If a response has not been received within the 15 minutes the job will automatically be cancelled and the work passed to another contractor.

The first message alerting the contractor of a new job includes the following details:

- Job Number
- New Job
- Postcode
- Date
- Contractor Code
- Short Job Description
- Accept?

Please note that the exact lay out of the information will depend on the type of mobile used.

To respond you must **FORWARD** the text to the Esendex number **65186** with a Y or N **after** the question mark.

Below is an example of a New Job message with the contractor's response ready to **forward** to Esendex:

AWCC-103895265/001,
New Job, PE7 4BT, 2009-
10-06, RTH5001, Water
supply internal/Radiator/
pipework, Accept? Y

NOTE: Jobs received by SMS Text must be accepted by SMS Text.

Job Rejected by Contractor

In the event that the job is refused the work will be deployed to another contractor and the refusal logged for management information in the usual way.

Job Accepted by Contractor

On accepting the job a second text with more complete details will be received allowing the contractor to contact the customer and arrange an ETA. At the same time either a confirmation fax or EDI message will be sent to the contractor's office depending on the normal contact method.

The SMS message with full job details will include the following:

- Job Number
- Full Job
- Postcode
- Contractor Code
- Customers Name
- Customer Address
- Customers Phone Numbers (Mobile & Landline)
- Short Job Description

Below is an example of the Full Job message received following the job acceptance:

AWCC-103895265/001,
Full Job, PE7 4BT,
RTH5001, Mr. B
Dickinson, 22 Acacia Ave,
Peterborough,
Cambridgeshire,
01526897541,
07854126876, Water
supply internal/Radiator/
pipework, AW

*NOTE: The message can be **forwarded** to another engineer's mobile as long as it is registered and this can be either at the initial New Job message stage or following receipt of Full Job details. This allows the person taking the work to it to the engineer who will attend site. The engineer who attends can then send the on site text and completion text to the Esendex number.*

Contact Updates

When you have accepted a new job and received the full details it will be necessary to attempt to call the customer. There are two updates that can be sent from this:

- CONTACT - Contact with the customer has been successful
- NOCONTACT - Contact with the customer has been unsuccessful

If the NOCONTACT update has been sent on a job the CONTACT message **must** be sent when contact is made. The DONE message will not be accepted by the system if a CONTACT message has not been sent. Any update that is sent to HomeServe via SMS is **not** case sensitive, i.e. CONTACT and contact will be accepted as the same update.

Contact AWCC-
103895265/001, Full
Job, PE7 4BT, RTH5001,
Mr. B Dickinson, 22
Acacia Ave, Peterborough,
Cambridgeshire,
01526897541,
07854126876, Water
supply internal

NOTE: If you have not sent the CONTACT message any completion message will fail. This will result in invoices being unpaid.

Job Updates

Other updates that should be sent are:

- ONSITE - The contractor is on site
- FWRK NP - The contractor is leaving site but further work is required to complete the job (no parts)
- FWRKPART - The contractor is leaving site and parts are required to complete the job

By sending these updates as appropriate you will keep HomeServe updated of the job status and help to reduce the chase calls for information.
All of these updates are sent by adding the text to the start of the Full Job message as below and **forwarding** the message to Esendex on **65186**.

Onsite Message

When the engineer arrives on site this message should be sent so Homeserve are aware that the job has started and the speed of attendance can be recorded for reporting to clients.

The Onsite message is sent by **forwarding** the Full Job SMS text message to the Esendex number **65186** adding **ONSITE** to the start of the message.

Below is an example of an onsite message ready to **forward** to Esendex.

Onsite AWCC-
103895265/001, Full
Job, PE7 4BT, RTH5001,
Mr. B Dickinson, 22
Acacia Ave, Peterborough,
Cambridgeshire,
01526897541,
07854126876, Water
supply internal/Radiator/
pipework, AW

Job Completion

For clarity completion in this case means all works are finished and the customer is satisfied that the work is complete. If this is not the case a Further Work message should be sent as described in the job updates section above.

On completion of the work the contractor should then send a completion message by **forwarding** the Full Job SMS text message to the Esendex number **65186** adding **DONE** to the start of the message.

Below is an example of a completion message ready to **forward** to Esendex:

Done AWCC-
103895265/001, Full
Job, PE7 4BT, RTH5001,
Mr. B Dickinson, 22
Acacia Ave, Peterborough,
Cambridgeshire,
01526897541,
07854126876, Water
supply internal/Radiator/
pipework, AW

Job Cancellation

Should a job be cancelled by HomeServe a message will be received with the text 'Cancelled' plus the initial job details. The message may be received either due to a customer cancellation or because of no response being made to HomeServe within the 15 minutes.

It is important to note new jobs will be sent to the SMS number provided to HomeServe. Following receipt of the new job all other messages will be sent to the registered mobile that responds to accept the job. This means that where the job is forwarded to another engineer for them to forward the acceptance to Esendex, the second engineer will receive the full details or any cancellations. If a job is cancelled it is up to the contractor to ensure that all engineers involved are aware.

Late Acceptance

If a contractor attempts to accept a job after the 15 minute window it will already have been cancelled and the job may have already been redeployed.

HomeServe Job Portal Contractors

The use of SMS Text is designed to complement the use of the HomeServe Job Portal and be available when the office is closed. If preferred the contractor can simply use the SMS Text out of office hours or can use a remote login to their HomeServe Job Portal to manage the jobs after receiving the SMS Text and accepting the job.

NOTE: If the contractor chooses to use SMS Text out of hours, the HomeServe Job Portal must also updated once the contractor returns to the office as any SMS Texts will update the HomeServe systems but WILL NOT update the Job Portal.

What do Homeserve expect from the contractor?

In order to have the desired impact in speeding communication, improving contact and improving customer service all of the contractors and their engineers must be familiar with the system and committed to its use including all of the different types of updates.

Important Things to Remember

- All mobiles need to be registered to receive and forward the text messages.
- The texts must be forwarded to the Esendex number 65186, do not send them direct to any HomeServe number.
- Do not edit the text content in any way.
- A response to the New Job message must be returned within 15 minutes or the job will be automatically cancelled.
- When you forward an acceptance, update or completion message the content must be in the format described above or it will not be recognised.
- If all of the required texts are not sent (i.e. acceptance, contact & done) an invoice cannot be paid.
- Remember to clear old text messages from your inbox. If your inbox is full you can not receive new messages.
- If you need help with the process you can speak to Network Support.

Portal & SMS User Guide

Version	Details	Requested by	Change by	Date
1.0	Initial version	Paul Greenwood	Antony Jolly	04/10/2011
1.1	Contractor Draft & inclusion of sms information	Paul Greenwood	Caroline McCoy	11/10/2011
1.2	Amendment to invoicing and completion page	Caroline McCoy	Antony Jolly	13/03/2012